Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Voluntary Report - public distribution

Date: 9/6/2001

GAIN Report #NL1060

The Netherlands

Tree Nuts

An Overview of the Dutch Market for Nuts

2001

Approved by:
Phil Letarte
U.S. Embassy, The Hague
Prepared by:
Wendalin Kolkman

Report Highlights:
Since 1998, Dutch consumption of specialty nuts has increased considerably to an estimated 45-55 percent of total nut consumption. U.S. nuts play an important role in Dutch imports of almonds, pistachios, pecans, walnuts and peanuts partly because of their high quality. In 2000, however, Dutch tree nuts imports from the United States dropped considerably, due to high prices and greater competition.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
The Hague [NL1], NL

Table of Contents

Executive Summary

In 1999, total Dutch consumption of peanuts, tree nuts and rice snacks decreased 6.5 percent to US $187 million in value and decreased 3.1 percent to 31,500 tons in volume compared to the previous year. Peanuts, tree nuts and rice snacks have a 30.8 percent share of total Dutch consumer expenditures for salted and piquant snacks.

As part of total Dutch food consumption, nuts constitute only a small share. On an average day, 9 percent of the Dutch population consume nuts. The average daily consumption per person is about 5 grams. In 1998, peanuts were the most important, with a share of 45 percent of the total amount of consumed nuts. Specialty nuts make up 30 percent, while coated peanuts have a 20 percent share. According to the Netherlands Association for the Trade in Dried Fruit, Spices and Related Products (NZV), the consumption of specialty nuts has increased considerably since 1998 to an estimated 45-55 percent of total nut consumption.

U.S. nuts play an important role in Dutch imports of almonds, pistachios, pecans, walnuts and peanuts because of their premium quality. Only a small volume of U.S. hazelnuts, however, is imported, because of their very high prices compared to hazelnuts from Turkey. Some former Soviet Union republics, like Azerbaijan, recently began commercial production of hazelnuts, walnuts and pistachios, which means that they could become significant competitors for U.S. tree nuts. In 2000, Dutch tree nut imports from the United States dropped considerably, due to high prices and competition.

Because of high U.S. prices, the bakery industry has turned to lower-priced alternatives. Hazelnuts are used instead of almonds and walnuts instead of pecans. Since California expects a large almond crop, prices of almonds should decrease. This should have a positive effect on exports of U.S. almonds to The Netherlands.

As a result of the recent European meat crises (dioxin in poultry, BSE, FMD and Swine Fever), and rumors about high dioxin and PCB levels in North Sea and Baltic Sea fish and about high residue levels of antibiotics in farmed fish, people are eating less meat and fish. Tree nuts have good prospects in the European market as an alternative to meat. Therefore, good export possibilities are expected for U.S. tree nuts.

The private label market in the Netherlands is showing significant signs of growth in the future. Many shoppers would like to see a wider variety of private label products in supermarkets, especially in the most popular ranges, like peanuts and nuts. In 1999, private label peanuts, nuts and rice snacks already have a relatively large market share of 2.5 percent in volume and 2.1 percent in value. Although private label is traditionally strong in the nuts market, there is a clear trend towards growth of name brands.

Current consumer trends indicate that buying decisions are increasingly being made based on quality. Sustainability, environmental and animal welfare play an increasingly important role. Consumer interest in organic products is growing, although many believe that organic products are expensive. On average, organic products are regarded as healthier. According to the U.S. Organic Trade Organization, the Netherlands has the highest per capita consumption of edible nuts in Europe, as a result, demand is higher for all sorts of edible organic nuts, especially peanuts, almonds, hazelnuts and walnuts, as well as coconuts.

Exchange Rate			
Year	**U.S. $**	**EURO**	**Dutch florin (guilder)**
1997	1	-	1.95
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.14	2.45

Note: For 2001 exchange rates are only available for the first six months

The Dutch Market for Nuts

In the Netherlands, nuts are grouped into the general category, 'snacks & confectionery.' In 1999, total Dutch consumption of snacks & confectionery increased 3.0 percent in value and decreased 0.4 in volume compared to the preceding year. Snacks & confectionery have a 10.0 percent share of total Dutch consumer expenditures on food and beverages. The total annual consumption of snacks & confectionery is estimated to be 35 kilograms per person.

Consumption of Snacks & Confectionery (x 1,000 tons)				
Product Segments	1997	1998	1999	share in 1999 (%)
1. Chocolate	71.9	74.2	74.6	13.4
2. Sweets	101.6	100.7	101.9	18.3
3. Biscuit, Pastry and Cakes	274.7	277.5	276.2	49.7
4. Salt and Piquant Snacks*	**101.7**	**105.3**	**103.0**	**18.6**
Total Snacks and Confectionery	549.9	557.7	555.7	100.0

Source: Research center for Snacks and Confectionery (SSZ), 2000
* Including tree nuts

Consumer Expenditures on Snacks & Confectionery (x million US$)				
Product Segments	1997	1998	1999	share in 1999 (%)
1. Chocolate	562	578	556	18.1
2. Sweets	644	652	640	20.8
3. Biscuit, Pastry and Cakes	1,314	1,317	1,270	41.4
4. Salt and Piquant Snacks*	**590**	**621**	**606**	**19.7**
Total Snacks and Confectionery	3,110	3,168	3,072	100.0

Source: Research center for Snacks and Confectionery (SSZ), 2000
* Including tree nuts

In 1999, total Dutch consumption of peanuts, tree nuts and rice snacks decreased 6.5 percent in value and decreased 3.1 percent in volume compared to the previous year. Peanuts, tree nuts and rice snacks have a 30.8 percent share of total Dutch consumer expenditures on salt and piquant snacks. Salt and piquant snacks have a share of 19.7 percent in consumer expenditures on snacks & confectionery.

Consumption of Salt and Piquant Snacks (x 1,000 Tons)				
Product Group	1997	1998	1999	share in 1999 (%)
1. Peanuts, Tree Nuts and Rice Snacks	**32.2**	**32.5**	**31.5**	**30.6**
2. Salt Biscuits and Pretzels	7.7	8.0	8.3	8.1
3. Toasts and Crackers	9.5	9.6	9.6	9.3
4. Chips and Sticks	37.1	38.8	36.9	35.8
5. Cocktail Snacks	15.2	16.4	16.7	16.2
Total Salt and Piquant Snacks	101.7	105.3	103.0	100.0

Source: Research center for Snacks and Confectionery (SSZ), 2000

Consumer Expenditures on Salt and Piquant Snacks (x million US$)				
Product Group	1997	1998	1999	share in 1999 (%)
1. Peanuts, Tree Nuts and Rice Snacks	**190**	**200**	**187**	**30.8**
2. Salt Biscuits and Pretzels	45	48	47	7.8
3. Toasts and Crackers	44	45	46	7.6
4. Chips and Sticks	163	174	173	28.5
5. Cocktail Snacks	148	154	153	25.3
Total Salt and Piquant Snacks	590	621	606	100.0

Source: Research center for Snacks and Confectionery (SSZ), 2000

Of the total Dutch food consumption, nuts still have a small share. On an average day, 9 percent of the Dutch population consume nuts. The average daily consumption per person is about 5 grams. Men older than 50 years consume the most nuts (6.6 grams per person per day), while children younger than 12 years hardly consume nuts (1.3 grams per person per day) at all. Only 3 percent of children under 12 consume nuts on an average day, partly due to the fact that the most important consumption moment is in the evening after dinner. In addition, nuts have to compare with chips and candies, like chocolate, which children prefer.

According to the Dutch Product Board for Horticulture, within the product group nuts, peanuts were most important with a share of 45 percent of the total amount of consumed nuts in 1998. In the Netherlands, approximately 80 percent of consumed peanuts are salted. Specialty nuts made up 30 percent, while coated peanuts have a 20 percent share. According to the Netherlands Association for the Trade in Dried Fruit, Spices and Allied Products (NZV), since 1998 the consumption of luxury nuts has increased considerably to an estimated 45-55 percent of total nut consumption.

Dutch Nuts Consumption per Product in Volume (%)		
Products	**1992**	**1998**
Peanuts	50	45
Coated Peanuts	21	20
Specialty Nuts*	**26**	**30**
Other	3	5
Total	100	100

Source: Product Board for Horticulture, 1999
* almonds, pistachios, pecan nuts, walnuts, hazelnuts etc.
Note: According to the Netherlands Association for the Trade in Dried Fruit, Spices and Allied Products (NZV), since 1998 the consumption of specialty nuts has increased considerably to an estimated 45-55 percent of total nut consumption.

Men younger than 21 years have a preference for coated nuts and salted nuts, while men older than 21 like specialty nuts. Specialty nuts are well-liked by men and women over 50 years. This group does not consume coated peanuts and salted nuts. In general, people at higher income levels consume more nuts than others

Dutch Nuts Consumption per Target Group in Volume (%)					
Target group	Peanuts	Coated Peanuts & Salted Nuts	**Specialty Nuts***	Other	Unknown
Children 1-12 years	42.6	20.7	**16.3**	10.4	10.1
Men 13-21 years	43.0	30.3	**10.5**	7.3	8.8
Men 22-49 years	45.8	20.7	**21.1**	6.4	6.1
Men 50+ years	50.3	12.0	**33.6**	1.1	3.1
Women 13-21 years	34.8	29.4	**22.0**	6.0	7.8
Women 22-49 years	31.4	22.6	**29.2**	5.2	11.7
Women 50+ years	46.9	7.9	**37.3**	0.7	7.2

Source: Product Board for Horticulture, 1999
* almonds, pistachios, pecan nuts, walnuts, hazelnuts etc.

Nuts are mainly consumed as snacks. Of all consumed nuts 73 percent are consumed in the evening after dinner. Specialty nuts are also consumed as a snack in the afternoon (approximately 20 percent). Only 4 percent of all nuts are consumed during dinner (in salads, deserts, Eastern food etc.). Nuts served during dinner are mainly almonds, cashews and walnuts.

Approximately 76 percent of all nuts consumed are eaten at home. Specialty nuts in particular, are more likely to be consumed at home. In 1992, 32 percent of specialty nuts were served outside the house, while that figure declined to 21 percent in 1998. On weekends, twice as many people eat nuts, or 14 percent of the Dutch population. Saturday and Sunday account for 46.5 percent of total weekly consumption.

Average Day Penetration and Volume of Consumed Nuts in The Netherlands

Year	Average day penetration	Volume (grams per person per day)
1987/1988	10.2	4.7
1992	10.8	5.9
1997/1998	9.1	4.8

Source: Product Board for Horticulture, 1999

The Dutch Supermarket Turnover of Peanuts, Tree Nuts and Related Products

Supermarkets are by far the main outlet for peanuts, tree nuts and rice snacks. In 1999, sales of these products in Dutch supermarkets decreased 6.4 percent. Nut shops, like "Deli-Nuts" and "C'est Bon," have the largest turnover in peanuts, tree nuts and rice snacks within the category "other outlets." The turnover in "other outlets" dropped 7.1 percent relative to the preceding year.

Share of Salt and Piquant Snacks per Outlet Type (%)

Product Group	1997		1998		1999	
	supermarkets	other outlets	supermarkets	other outlets	supermarkets	other outlets
1. Peanuts, Tree Nuts & Rice Snacks	**94**	**6**	**93**	**7**	**93**	**7**
2. Salt Biscuits and Pretzels	90	10	91	9	92	8
3. Toasts and Crackers	82	18	82	18	83	17
4. Chips and Sticks	90	10	90	10	89	11
5. Cocktail Snacks	95	5	94	6	94	6
Total Salt and Piquant Snacks	92	8	91.5	8.5	91.3	8.7

Source: Research center for Snacks and Confectionary (SSZ), 2000

Turnover of Salt and Piquant Snacks by Outlet Type (x US$ Million)						
Product Group	1997		1998		1999	
	Supermarkets	Other Outlets	Supermarkets	Other Outlets	Supermarkets	Other Outlets
1. Peanuts, Tree Nuts & Rice Snacks	**178**	**11**	**186**	**14**	**174**	**13**
2. Salt Biscuits and Pretzels	40	5	43	4	43	4
3. Toasts and Crackers	36	8	37	8	38	8
4. Chips and Sticks	147	16	157	17	154	19
5. Cocktail Snacks	141	7	145	9	144	9
Total Salt and Piquant Snacks	542	47	568	52	553	53

Source: Research center for Snacks and Confectionary (SSZ), 2000

According to AC Nielsen, supermarket turnover for peanuts, tree nuts and related products in 2000 increased only 2.8 percent to U.S. $144.7 million, relative to 1999. Corrected for inflation, is a negative development, according to AC Nielsen. The volume of peanuts, tree nuts and related products sold in supermarkets remained at 29.5 million kilograms. Further processed products like chocolate covered raisins and banana chips are the fastest growing product group within this segment. In addition, a shift is seen towards specialty nuts. To maintain a reasonable growth in the turnover of peanuts, tree nuts and related products, innovation is needed, either in the packaging, pricing, or new uses.

Share of Peanuts, Tree Nuts and Allied Products in Dutch Supermarkets in 2000	
Product	Share (%)
1. Specialty Nuts (like almonds, pistachios, pecan nuts, walnuts and hazelnuts)	**29.3**
2. Coated Peanuts	23.5
3. Peanuts	21.8
4. Nuts Mixtures	13.7
5. Sweet Nuts and Peanuts	8.1
6. Allied Products	3.5

Source: AC Nielsen, 2000

The Six Largest Food Buying Organizations in the Netherlands in 2000			
Retailer/Wholesaler - type of outlet	**Sales/ Market share**	**Number of Outlets**	**Purchasing**
Albert Heijn, Retailer, National Multiple	US$ 5.5 billion 27.8 percent	1,790 nation wide	Direct, Imp./ wholesaler
Laurus Group, Buying organization for supermarket chains Super De Boer, Edah, Konmar, Spar, Groenwoudt Supermarkten and Basismarkt	US$ 4.7 billion 23.8 percent	1,908 nation wide	Direct, Imp./ wholesaler
Trade Service Nederland, (TSN) Buying organization for wholesalers Schuitema, Sperwer, A&P, Prisma Food Groep, Boon Sliedrecht and Codis	US$ 4.2 billion 21.0 percent	1,730 nation wide and regional	Direct, Imp./ wholesaler
Superunie, Buying organization for 14, usually family owned, regional supermarket chains	US$ 3.5 billion 17.8 percent	1,240 regional	Direct, Imp./ wholesaler
Aldi, Retailer	US$ 1.3 billion 6.3 percent	359 nation wide	Direct, Imp./ wholesaler
Koopconsult, Buying organization for the regional wholesaler Samenwerkende Dirk van den Broek Bedrijven	US$ 0.4 billion 2.1 percent	173 regional	Direct, Imp./ wholesaler
IN TOTAL	**US$ 19.6 billion 98.8 percent**	**7,200**	**Direct, Imp./ wholesaler**

Source: Elsevier Business Information, 2000

Packaging Industry for Nuts

Concentration of the Nuts Packaging Industry
Because of mergers and concentration, only a few nut packaging companies are left in the Netherlands. The Dutch based "Nut Company, B.V." is the European market leader in the nuts food sector. This market includes nuts that are processed in various ways and nut-based products. The 3 major segments in this market are consumer brands, private label products and ingredients. The "Nut Company" is active in all of these segments. The company was created in 2000 when Felix Snack Group GmbH, Ültje GmbH, and the Granaria Food Group B.V. decided to merge their nut operations. These companies already had a long history in most European markets. The "Nut Company" has production units throughout Europe.

The "Nut Company" is market leader in the European private label nuts market, but offers also brands like Ültje, Jack Benoit, Felix and Jack Klijn. Traditionally Imko, the Dutch division of the "Nut Company," is a supplier of private label products. However, the brand Jack Klijn was introduced in 2000 and quickly achieved significant market share. The product range includes tree nuts, like almonds, macadamias and Bombay cashews, as well as peanuts. The "Jack Klijn" product range is promoted as "Nuts from afar are the finest."

The addresses of the main Dutch tree nuts companies can be found below:

The Nut Company B.V.
(European head office)
Mr. H.P. Zijlmans
Bedrijvenpark IJsseloord 2
Meander 601
Nl-6825 ME, Arnhem
The Netherlands
Tel: +31.26.3840150
Fax: +31.26.3840151
Internet: www.thenutcompany.com

Imko Nut Products B.V.
(Dutch division of The Nut Company B.V.)
Mr. A. Mulder
P.O. Box 29
NL-7000 AA Doetinchem
The Netherlands
Tel: +31.314.370200
Fax: +31.314.370299
Internet: www.imkonut.com

Samba B.V.
Mr. P. van Otterloo
P.O. Box 12
NL-4284 ZG Rijswijk, Noord-Brabant
The Netherlands
Tel: +31.183.445050
Fax: +31.183.445059
Internet: www.samba.nl

The Dutch company "Duyvis B.V." is the main processor of coated and salted packed peanuts in the Netherlands. In the product category "peanuts and nuts," Duyvis is the only premium quality brand in the Netherlands.

Duyvis B.V.
P.O. Box 1522
Mr. F.R. Vijvers
NL-3430 BM, Nieuwegein
The Netherlands
Tel: +31.30.6309999
Fax: +31.30.6309420
Internet: www.duyvis.com

Trade Policy

Quality Improvement Plans and Standards
The 1996 reform to the Common Market Order (CMO) for Fruit and Vegetables repealed the 10-year quality improvement plans for the EU nut sector. Existing projects may be completed, with the last projects expiring in 2006. The European Commission is under great pressure from Spain, Italy, Greece and Portugal to extend this specific aid because it would reportedly solve social, economic and environmental problems in the nut sector. The European Commission will undertake a study and present a report on these problems and will come up with proposals, if necessary. EU Quality standards have been established for walnuts in shell, while standards for almonds and hazelnuts are being developed but have not been finalized.

Aflatoxin
Maximum levels for aflatoxins were set in Commission Regulation 1525/98 which will be repealed as of April 5, 2002, by Commission Regulation 466/2001. In addition to the obligations resulting from Community legislation concerning specific foodstuffs such as Iranian pistachios, most EU countries have made testing nuts for aflatoxins one of their main priorities. Nevertheless, sampling rates vary depending on the type of nut, the particular Member State and sometimes even the different inspection offices. Most attention is reportedly being paid to groundnuts rather than tree nuts.

Maximum Levels for Aflatoxins		
	B1	B1, B2, G1 and G2 combined
Groundnuts and nuts and processed products thereof, intended for direct human consumption or as an ingredient in foodstuffs	2 microgram/kg	4 microgram/kg
Groundnuts to be subjected to sorting, or other physical treatment, before human consumption or use as an ingredient in foodstuffs	8 microgram/kg	15 microgram/kg
Nuts to be subjected to sorting, or other physical treatment, before human consumption or use as an ingredient in foodstuffs	5 microgram/kg	10 microgram/kg

Source: Office of Agricultural Affairs, USEU Brussels
Note: Maximum levels for aflatoxins were set in Commission Regulation 1525/98 which will be repealed as of April 5, 2002, by Commission Regulation 466/2001

On September 8, 1997, Commission Decision 97/613/EC established an initial ban on imports of pistachios and pistachio products from Iran. On December 11, 1997, the ban was amended by Commission Decision 97/830/EC, allowing for certification by Iranian authorities. Pistachios originating in or consigned from Iran have in many cases been found to be contaminated with excessive levels of aflatoxin B1. Aflatoxin B1 causes cancer of liver and in addition is genotoxic, even at extremely low doses.

On May 28, 1999, Commission Decision 1999/356/EC established an initial ban on peanut imports and peanut products from Egypt. On December 6, 1999, the ban was amended by Commission Decision 2000/49/EC, imposing special conditions on imports of peanuts and certain products derived from peanuts originating in or consigned from Egypt. The maximum levels for aflatoxins have reportedly far exceeded EU limits deemed to be safe. Contamination of aflatoxin B1 at levels high as 485 microgram/kg has been detected in peanuts from Egypt.

Market Opportunity
A ban on imports of peanuts and peanut products from China is also reportedly being proposed, because the maximum levels for aflatoxins have been exceeded in various samples. Since China is a major exporter of peanuts, a ban on Chinese peanuts and peanut products might greatly improve prospects for peanut exporters who can confirm to the low aflatoxin limits.

Trade

According to The Netherlands Association for Trade in Dried Fruit, Spices and Related Products (NZV), U.S. nuts play an important role in Dutch imports of almonds, pistachios, pecans, walnuts and peanuts because of their high quality. However, only a small volume of U.S. hazelnuts is imported, because of their very high prices compared to hazelnuts from Turkey. Some former Soviet Union republics, like Azerbaijan, recently started with the commercial production of hazelnuts, walnuts and pistachios as well, which means that they could become major competitors for U.S. tree nuts.

Approximately 90-95 percent of imported almonds is used by to the processing industry to produce almond paste, marzipan, candy bars etc. Also, a large part of imported hazelnuts is used by the processing industry for the production of candy bars, ice-cream, pastry, chocolate etc. Most pistachios, pecans and walnuts are consumed directly by consumers. Only a small part is used in the production of foods like pistachio ice-cream and pecan pie, which are not traditionally Dutch or European dishes.

Although the NZV figures for 2000 are not available yet, it appears that Dutch tree nut imports from the United States have dropped considerably, especially for pistachios and almonds. According to U.S. Trade Statistics, exports of U.S. pistachios to the Netherlands decreased 36 percent in volume and 38 percent in value in 2000, compared to the preceding year. Exports of U.S. almonds dropped 9 percent in volume and 19 percent in value. There are three main reasons that explain this decrease:

- High U.S. dollar
- Tree nut production worldwide reached highs in 1999/00, which resulted in very low prices worldwide.
- High stocks from 1998/99 production did not require importers to buy large amounts.

It is expected that the worldwide 2000/01 production was high as well. The forecast for the 2001/02 production is also good.

Dutch Trade in Selected Nuts in 1999					
IMPORT			**EXPORT**		
	MT	**1000 US$**		**MT**	**1000 US$**
Sweet Almonds	***10,000***	***35,851***	***Sweet Almonds***	***1,600***	***6,011***
United States Spain Other	**7,300** 2,100 600	**26,383** 7,447 2,021	Germany Belgium France Other	470 390 290 480	1,649 1,638 814 1,920
Bitter Almonds	***192***	***649***	***Bitter Almonds***	***27***	***106***
United States Other	**60** 132	**271** 378	France Other	20 7	74 32
Pistachios	***2,980***	***10,000***	***Pistachios***	***1,680***	***4,713***
United States Iran* Other	**2,000** - 980	**7,553** - 2,447	Italy Germany Other	1,065 555 60	2,553 1,830 330
Pecan Nuts	***1,100***	***7,553***	***Pecan Nuts***	***264***	***1,372***
United States South-Africa Other	**1,020** 65 15	**7,128** 334 91	Germany United Kingdom, Spain Switzerland Other	63 47 24 22 108	503 233 116 34 486
Walnuts shelled	***6,270***	***10,851***	***Walnuts shelled***	***2,180***	***3,053***
United States Other	**6,225** 45	**10,798** 53	Germany Other	1,630 550	1,888 1,165
Walnuts without shells	***1,700***	***6,702***	***Walnuts without shells***	***900***	***3,617***
United States India* Other	**630** 420 650	**2,766** 1,436 2,500	Germany Other	700 200	2,819 798
Cashew Nuts without shells	***19,240***	***117,394***	***Cashew Nuts without shells***	***10,890***	***58,957***
United States India* Other	**178** 15,930 3,132	**995** 98,617 17,782	**United States** Germany France United Kingdom Greece Other	**206** 7,250 1,140 710 534 1,050	**1,074** 38,596 6,899 4,426 1,702 6,260

Hazelnuts without shells	***3,060***	***12,106***	***Hazelnuts without shells***	***900***	***3,723***
United States Turkey Other	**21** 1,800 1,239	**99** 7,021 4,986	Belgium Germany Other	340 250 310	1,404 1,021 1,298
Paras with shells	***1,050***	***3,085***	***Paras with shells***	***184***	***665***
United States Bolivia Other	**8** 517 525	**27** 1,511 1,547	**United States** South Africa Other	**16** 83 85	**6** 399 260
Paras without shells	***1,000***	***2,979***	***Paras without shells***	***963***	***2,979***
United States United Kingdom Bolivia Chili Other	**-** 335 322 230 113	**-** 989 947 670 373	Germany Belgium Other	518 169 276	1,521 532 926
Macadamia Nuts	***348***	***2,426***	***Macadamia Nuts***	***86***	***617***
United States Australia South Africa Other	**-** 140 170 38	**-** 1,191 1,064 171	Luxembourg Germany Other	34 28 24	213 207 197
Peanuts with shells	***11,940***	***9,032***	***Peanuts with shells***	***1,478***	***1,117***
United States China Other	**3,220** 7,140 1,580	**3,106** 4,894 1,032	Germany Belgium Other	433 239 806	298 202 617
Peanuts without shells	***140,520***	***111,170***	***Peanuts without shells***	***49,600***	***45,037***
United States Argentine China Other	**28,140** 75,410 24,040 12,930	**26,702** 55,968 18,798 9,702	**United States** Germany France United Kingdom Other	**207** 16,280 11,120 8,000 13,993	**251** 13,053 12,979 6,223 12,531
TOTAL	199,400	329,798	***TOTAL***	70,752	131,967
United States	48,800	85,828	**United States****	429	1,331

Source: The Netherlands Association for the Trade in Dried Fruits, Spices and Related Products (NZV), 2001
* Due to low labor costs for shelling
** Due to large international nut trading companies which are based in the Netherlands
Note 1: In 1997, 3,750 tons pistachios were imported, of which 2,250 tons came from Iran and 860 tons came from the United States. Since 1998, Iranian pistachios have been banned in the European Union because of high aflatoxin levels.
Note 2: Figures are based on Eurostat Statistics and differs considerably from the figures of U.S. Trade Statistics

Market Developments

Because of high U.S. prices, the bakery industry has turned to alternative, less expensive products. Hazelnuts are used instead of almonds and walnuts instead of pecans. However, since California expects a large almond crop, prices of almonds should decrease. This will have a positive effect on U.S. almond exports to the Netherlands.

As a result of the recent European meat crises (dioxine in poultry, BSE, FMD and Swine Fever), and rumors about high dioxin and PCB levels in North Sea and Baltic Sea fish and about high residue levels of antibiotics in farmed fish, people are eating less meat and fish. Tree nuts have good prospects in the European market as an alternative to meat. Therefore, good export possibilities are expected for U.S. tree nuts.

Private Label
The private label market in the Netherlands shows significant signs of growth in the future. Many shoppers would like to see a wider variety of private label products in supermarkets, especially in the most popular ranges, like peanuts and tree nuts. In 2000, private label peanuts, tree nuts and rice snacks already have a relatively large market share of 34.2 percent in volume and 41.1 percent in value. Albert Heijn, the largest retail chain in the Netherlands, is an important supplier of private label nuts under its own "AH" label and "Euroshopper" label. Although private label is traditionally strong in the nuts market, there is a clear trend towards growth of name brands. In 2000, the market share of private label peanuts, tree nuts and rice snacks decreased 0.8 percent in volume and 0.2 percent in value, compared to 1999. For more information on the annual Private Label Manufacturers Association-Trade Show and private labels in general, please contact:

PLMA International Council
World Trade Center
Strawinskylaan 671 — Tel: +31 20 575 3032
NL-1077 XX Amsterdam — Fax: +31 20 575 3093
The Netherlands — Internet: www.plma.com

Consumer Preferences
Current consumer preferences indicate that product quality exceeds taste and health aspects. Sustainability, environmental and animal welfare play an increasingly important role. Consumer interest in organic products is growing, although many believe that organic products are expensive. On average, organic products are regarded as healthier. According to the U.S. Organic Trade Organization, the Netherlands has the highest per capita consumption of edible nuts in Europe. Therefore, there is a strong demand for all sorts of edible organic nuts, especially peanuts, almonds, hazelnuts and walnuts, as well as coconuts. This is partly due to the Dutch inclination for Indonesian and Chinese cuisine, where those items have an important place. For more information on Dutch importers of organic nuts and organics in general, please contact:

Platform Biologica
P.O. Box 12048 — Tel: +31.30.2339970
NL-3501 AA Utrecht — Fax: +31.30.2304423
The Netherlands — Internet: www.platformbiologica.nl

Addresses

For detailed trade information on the trade in nuts, please contact the following organizations:

Netherlands Association for the Trade in Dried Fruit, Spices and allied Products (NZV)
Mr. W.H.G. Lucas, Secretary
Bezuidenhoutseweg 82
NL-2594 AX, The Hague
The Netherlands
Tel: +31.70.3833011
Fax: +31.70.2475253
Email: secretariaat@nzv-org.nl
Internet: www.zuidvruchten.nl

Dutch Peanuts Council
Ms. Catrien Kienhuis
Reitseplein 1
P.O. Box 4076
NL-5004 JB Tilburg
The Netherlands
Tel: +31.13.5944239
Fax: +31.13.5944747
Email: D.P.C.@wispa.nl

Research Center for Snacks and Confectionary (SSZ)
Mr. P.T. van Vliet, Director
Laan van Vollenhove 3217
NL-3706 AR, Zeist
The Netherlands
Tel: +31.30.6950304
Fax: +31.30.6961305

Product Board for Horticulture
Mr. W. van der Berg
P.O. Box 280
NL-2700 AG, Zoetermeer
The Netherlands
Tel: +31.79.3470707
Fax: +31.79.3470404
Email: pt@tuinbouw.nl
Internet: http://www.tuinbouw.nl

Dutch Importers of U.S. Nuts

American Food Service
Mr. G. Chin A. Kwie
Gageldijk 1
NL-3602 AG Maarssen
The Netherlands
Tel: +31.30.2613604
Fax: +31.30.2613624

Catz International
Mr. M. Kok
P.O. Box 180
NL-3000 AD Rotterdam
The Netherlands
Tel: +31.10.4113440
Fax: +31.10.4045406

De Winter en Konijn Agent B.V.
Mr. G. Van Dijk
P.O. Box 235
NL-1520 AE Wormerveer
The Netherlands
Tel: +31.75.6286811
Fax: +31.75.6286178

Duyvis B.V.
P.O. Box 1522
Mr. F.R. Vijvers
NL-3430 BM Nieuwegein
The Netherlands
Tel: +31.30.6309999
Fax: +31.30.6309420

Felix Cohen
Mr. F. Bertens
P.O. Box 410
NL-4900 AK Oosterhout
The Netherlands
Tel: +31.162.684120
Fax: +31.162.686536

Menken Orlando B.V.
Ms. W.M. Keijzer
P.O. Box 43464
NL-2504 AL The Hague
The Netherlands
Tel: +31.70.3082222
Fax: +31.70.3669070

The Nut Company B.V.
(European head office)
Mr. H.P. Zijlmans
Bedrijvenpark IJsseloord 2
Meander 601
Nl-6825 ME, Arnhem
The Netherlands
Tel: +31.26.3840150
Fax: +31.26.3840151
Internet: thenutcompany.com

Imko Nut Products B.V.
(Dutch division of The Nut Company B.V.)
Mr. A. Mulder
P.O. Box 29
NL-7000 AA Doetinchem
The Netherlands
Tel: +31.314.370200
Fax: +31.314.370299

Samba B.V.
Mr. P. van Otterloo
P.O. Box 12
NL-4284 ZG Rijswijk, Noord-Brabant
The Netherlands
Tel: +31.183.445050
Fax: +31.183.445059
Internet: www.samba.nl

The Peanut Company
Mr. H.J.J. van Borssum Waalkes
Lovenholm 12
NL-2133 JP Hoofddorp
The Netherlands
Tel: +31.23.5658225
Fax: +31.23.5626345
The Netherlands